

CJA 20 Hourly Spreadsheet Setup and Instruction Guide

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**Automated CJA 20 Hourly Spreadsheet
Setup and Instruction Guide
District of Massachusetts**

General Information

The Court's automated CJA voucher spreadsheet uses Microsoft Excel for the purpose of calculating and summarizing hours, rates, and other CJA costs. Please download and save this file to use in tracking and computing your CJA related fees and expenses. The spreadsheet is designed to automatically calculate dollar amounts for the hours spent for In-Court and Out-of-Court time, and to add expense entries into the proper categories. In addition, the entered data will automatically upload to the CJA-20 voucher form.

Adjusting Your Computer Settings - IMPORTANT!!

Please read the following very carefully. These instructions will provide step-by-step directions to ensure settings are correct on the PC being used for the voucher preparation.

The CJA 20 Hourly Spreadsheet has an embedded macro that assists with print settings (prevents the printing of empty lines and ensures that any line that has data will be included in the printed document). The following screen prints will display the steps necessary to enable the included Print Setup macro. If you are a MAC user, the **Print / PDF Setup** button and **Sort by Date** button macros do not apply, but please go through the following steps to enable checkbox buttons on the **Voucher** tab.

1. When opening the CJA 20 Hourly Spreadsheet for the first time, you might see a box that looks like **Figure 1**. This means that the security settings in Excel are set to **High** (Click on **OK**). They must be set to **Medium**.



Figure 1

Below in **Figure 2** is the same box, except the help area is not showing. If the **Show Help** button is clicked, it will expand to look like **Figure 1**.



Figure 2

If you did not see the previous box, you might see one like **Figure 3**. This means that the security settings in Excel are set to **Very High**. In either case, they must be set to **Medium** (click on **OK**). If you do not get either of these messages, please skip to step #6 for another message option.



Figure 3

2. Please click on **Tools>Macro>Security...**

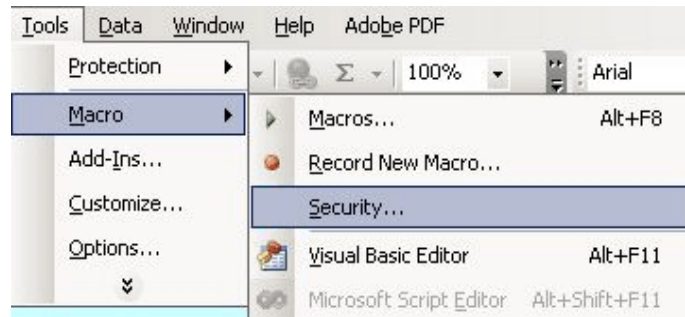


Figure 4

3. As the dialog box screen print illustrates (**Figure 5**), please click on **Medium**. Click on **OK**.
4. Please close the CJA 20 Hourly Spreadsheet (if you are prompted to save changes, please click on **No** and then close Excel).
5. Reopen Excel and then open the CJA 20 Hourly Spreadsheet.

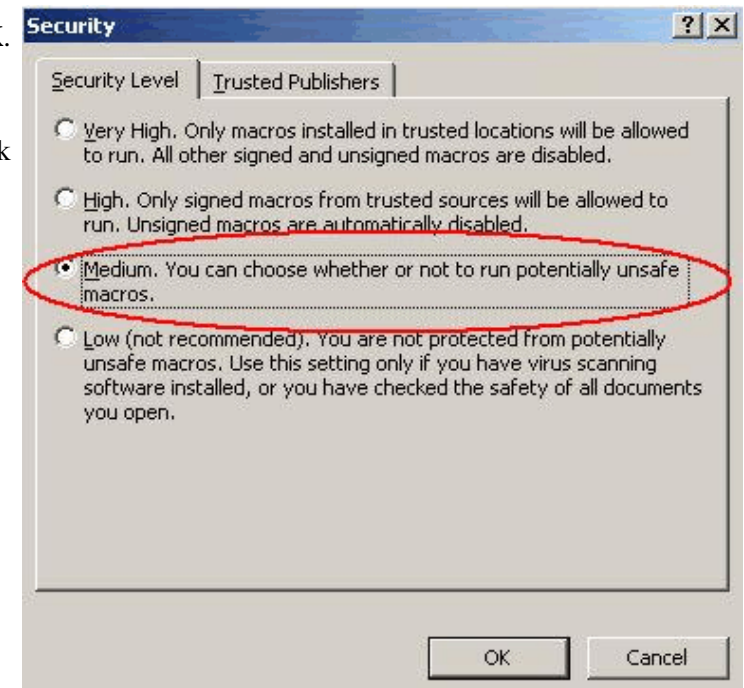


Figure 5

6. Upon opening, a dialog box will display (**Figure 6**). Click on **Enable Macros**.

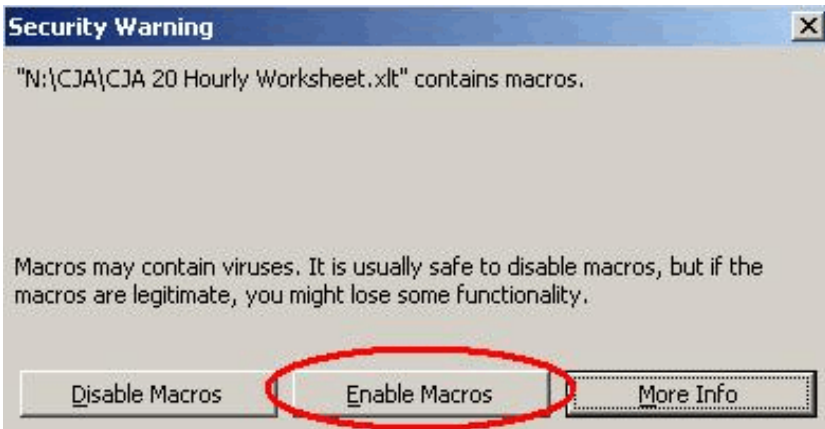


Figure 6

NOTE: Changing this setting will not compromise the security of your PC. It is only causing the PC to give the choice to YOU whether or not to open a file that has macros. From now on, if an Excel spreadsheet file is opened that has a macro incorporated into the file, you will get this prompt and if you do not trust the source of the file, it is important to choose **Disable Macros**.

FYI: If you are having trouble checking the checkboxes on the CJA 20 **Voucher** tab in the spreadsheet, then you have neglected to click on **Enable Macros** when launching the spreadsheet. Close the spreadsheet and re-open to get the message again. If you do not get this message, go back to step 2. If you have **Excel 2007**, scroll down to the **Addendum** (page 13).

Once the **Enable Macros** button is clicked, the file will open to the **Services** tab.

Understanding the CJA 20 Hourly Worksheet Tabs

The CJA 20 Hourly spreadsheet is made up of four worksheets: **Services**, **Expenses**, **Summary**, and **Voucher** as depicted by the tabs at the bottom left of the page. These worksheets are date driven and will automatically calculate rate changes within the dates entered. ★ **It is very important to pay close attention to the dates entered in order to insure accurate calculations for billing!!** ★

- The first tab in the spreadsheet is the **VOUCHER** worksheet tab. This worksheet will display uploaded data entered on the **Services** and **Expenses** worksheets.
- When the spreadsheet is first opened in Excel, the **SERVICES** worksheet tab is displayed. Use this worksheet to record billable hours for **In Court** and **Out of Court** activity.
- Next to the **Services** tab is the **EXPENSES** worksheet tab. Use this worksheet to record other costs such as mileage, travel, copying costs, facsimile costs, etc.
- Next to the **Expenses** tab is the **SUMMARY** worksheet tab. This worksheet will automatically summarize costs of items entered on the **Services** and

Expenses worksheets.

Completing the CJA 20 Hourly Spreadsheet

NOTE: The top header of the **Services** tab (**Figure 7**) has the following mandatory fields. Once these fields are completed on the **Services** tab, the data will simultaneously populate to all the other tabs.

Attorney:	_____
Defendant:	_____
Material Witness:	_____
Case No:	_____
Judge:	_____
Bill Dates	From: _____
	To: _____

REMINDER: Hourly rates are determined by the DATE entered, so **PLEASE** check your work!

Figure 7

Complete all appropriate fields as indicated below. **Remember that "In and Out of Court" time is recorded in tenths of an hour (6 minutes = .10).**

A. Completion of the **Services** Worksheet

1. Enter the header information. This information will automatically populate to the **Expenses**, **Summary**, and **Voucher** worksheets.

Attorney	-Enter attorney's name
Defendant	-Enter the defendant's name as it appears on the docket
Material Witness	-Enter the material witness's name as it appears on the docket
Case No.	-Enter the criminal/mag. case number assigned
Judge	-Enter the Judge's initials
Bill Dates	-Enter the "from/to" date range of the billing

2. Enter the line by line data for "In and Out of Court" activity. Enter the date (MM/DD/YY), description of the entry, document number reflected

on the docket in ECF (if applicable), number of pages for disclosure reviewed or motions filed, and time worked in the appropriate columns 15a. through 16e., as applicable (**Figure 8**). (**Remember that billable hours are claimed in tenths of hour; 6 mins. = .10**). The hourly rate will automatically be applied to the time charged. The following columns correspond to the lines on the CJA-20 voucher.

In Court

- 15a - Arraignment and/or Plea Hrg
- 15b -Bail & Detention Hearing
- 15c - Motion Hrg
- 15d – Trial
- 15e – Sentence Hrg
- 15f – Revocation Hrg
- 15g – Appeals Court Hrg
- 15h – Other

Out of Court

- 16a - Interviews/conferences
- 16b - Obtaining/reviewing records
- 16c - Legal research & Brief Writing
- 16d – Travel time
- 16e – Investigative and other work

<div style="display: inline-block; border: 1px solid black; padding: 2px; margin-right: 5px;">Sort by Date</div> <div style="display: inline-block; border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Printing / PDF Setup</div>		CJA 20 Worksheet - Attorney Time														
Attorney:																
Defendant:																
Material Witness:																
Case No:																
Judge:																
Bill Dates	From:															
	To:															
REMEMBER: Hourly rates are determined by the DATE entered, so PLEASE check your work!																
Date	Services Description	Doc Number (ECF)	Pages	15 a Arraignment/Plea	15 b Bail/Detention	15 c Motions	15 d Trial	15 e Sentencing	15 f Revocation	15 g Appeals Court	15 h Other	16 a Interviews	16 b Records	16 c Research/Writing	16 d Travel Time	16 e Investigative/Other
5/1/06	Conference with defendant											0.5				
5/1/06	Arraignment			0.5												

Figure 8

B. Completion of the **Expenses** Worksheet

1. Enter the line by line data for "Travel Expenses" and "Other Expenses" activity (**Figure 9**). Mileage entered will automatically be calculated by the rate in effect **as of the date** of that entry. Dollar amounts claimed for expenses, other than mileage, must be manually entered in the appropriate columns. Include a detailed description for all other expenses claimed. (For example, when entering the expense claim for photocopies; the description might read as: "40 copies @ .20 each", then manually enter \$8.00 in the "Photocopies" column.)

BOX 17 Travel Expenses

Date

Expense Description (ie, mileage to CCA, or parking)

Travel Miles (enter # of miles only)

Travel Misc. (parking)

BOX 18 - Other Expenses

Facsimile

Long Distance Charges

Photocopies

Postage

Other Expenses

CJA 20 Worksheet - Expenses									
Attorney:		<u>Joe Attorney</u>							
Defendant:		<u>Jane Defendant</u>							
Material Witness:		<u></u>							
Case No:		<u>CR 07-1234-001</u>							
Judge:		<u>JMR</u>							
Bill Dates		<u>From 5/1/05</u>							
		<u>To: 7/29/07</u>							
<div> REMEMBER: Hourly rates are determined by the DATE entered, so PLEASE check your work! </div>									
Date	Expenses Description	17 Travel Miles	17 Travel Misc.	18 - Facsimile	18 - Long Distance Charges	18 - Photocopies	18 - Postage	18 Other Expenses	
5/1/06	rt trvl to court	20							
7/29/07	rt trvl to court	20							
7/29/07	3 copies @ .20 each					\$0.60			

Figure 9

C. Locked Cells

1. As information is entered on the **Services** and **Expenses** tabs, the data will transfer to the **Summary** tab and the **Voucher** tab. Those fields on the **Voucher** tab that have been populated by the **Services** or the **Expenses** tab will be locked to prevent any modifications. If adjustments are needed to those locked fields, the adjustments must be made to either the **Services** or the **Expenses** tab. If an attempt is made to edit a field that is locked on any of the tabs, the following message will be displayed on the screen (**Figure 10**):



Figure 10

Click on **OK** and continue working.

Automated CJA 20 Hourly Spreadsheet
Setup and Instruction Guide
Page 10

D. The **Summary** Worksheet (completed automatically as information is entered on the **Services** and **Expenses** tabs)

This sheet presents the calculated totals based on hours and miles/expenses entered in the **Services** and **Expenses** worksheets (Figure 11).

CJA 20 - Voucher Summary														
Attorney: _____ Defendant: _____ Material Witness: _____ Case No: _____ Judge: _____ Bill Dates _____ To: _____														
Categories	1/1/2008 - Current (\$100/hour)	5/20/2007 - 12/31/07 (\$94/hour)	1/1/2006 - 5/19/07 (\$92/hour)	5/1/2002 - 12/31/2005 (\$90/hour)										
	Hours Claimed	Hours Claimed	Hours Claimed	Hours Claimed										
15a - Arraignment/Plea	0.0	0.0	0.0	0.0										
15b - Bail/Detention	0.0	0.0	0.0	0.0										
15c - Motions	0.0	0.0	0.0	0.0										
15d - Trial	0.0	0.0	0.0	0.0										
15e - Sentencing	0.0	0.0	0.0	0.0										
15f - Revocation	0.0	0.0	0.0	0.0										
15g - Appeals Court	0.0	0.0	0.0	0.0										
15h - Other	0.0	0.0	0.0	0.0										
Total 15a - 15h (Hours)	0.0	0.0	0.0	0.0										
Total In-Court x Rate Per Hour	\$0.00	\$0.00	\$0.00	\$0.00										
16a - Interviews	0.0	0.0	0.0	0.0										
16b - Records	0.0	0.0	0.0	0.0										
16c - Research/Writing	0.0	0.0	0.0	0.0										
16d - Travel Time	0.0	0.0	0.0	0.0										

17. Travel Miles	2/1/2007 - Current	1/1/2006 - 1/31/2007	9/1/2005 - 12/31/2005	2/4/2005 - 8/31/2005
	(.485 per mile)	(.445 per mile)	(.485 per mile)	(.405 per mile)
	Miles Claimed	Miles Claimed	Miles Claimed	Miles Claimed
Total Miles Driven	20	20	0	0
Total Miles x Rate Per Mile	\$9.70	\$8.90	\$0.00	\$0.00
17. Travel Misc.	\$0.00			
17. Total Travel Expenses	\$18.60			
18. Facsimile	\$0.00			
18. Long Distance Charges	\$0.00			
18. Photo Copies	\$0.60			
18. Postage	\$0.00			
18. Other Expenses	\$0.00			
18. Total	\$0.60			
Grand Total Of CJA Voucher	\$111.20			

Figure 11

F. Completion of the **Voucher** Tab

Data entered on the **Services** and **Expenses** tabs will carry over to the CJA 20 **Voucher** tab. However, this form requires certain additional information to be entered prior to submission for payment, specifically boxes 1, 3, 8 through 12, 21 and 22. Boxes 6 and 7 must be completed if applicable.

FYI: If you are having trouble checking the checkboxes on the CJA 20 **Voucher** tab in the spreadsheet, then you have neglected to click on **Enable Macros** when launching the spreadsheet. Close the spreadsheet and re-open to get the message again. If you do not get this message, go back to step 2. If you have **Excel 2007**, scroll down to the **Addendum** (page 13). **Please enter and review all information on this form prior to converting to .pdf.**

G. Sort by Date button (Not included on MAC spreadsheet)

Once all the necessary entries have been input on the **Services** and the **Expenses** tabs and all information has been checked for accuracy or even before, you can sort all your entries by date. In the area of cell A1 (on the spreadsheet, **NOT** the toolbar) there is a gray **Sort by Date** button that looks like this (Figure 12):

Sort by Date

Figure 12

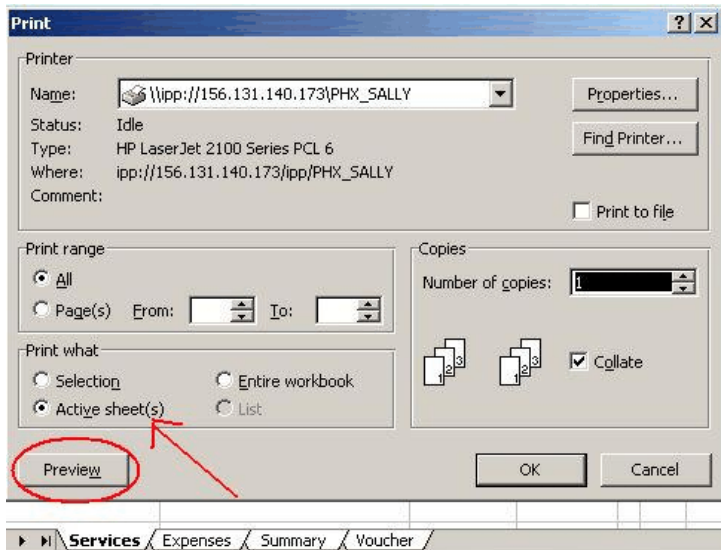
This button is programmed to sort all entries by date in ascending order simultaneously on both the **Services** and the **Expenses** tabs.

H. Printing and/or Converting the **Voucher** and Worksheets to PDF (Not included on MAC spreadsheet)

Once all the necessary entries have been input on the **Services** and the **Expenses** tabs and all information has been checked for accuracy, the voucher is ready to print. In the area of cell B1 (on the spreadsheet, **NOT** the toolbar) there is a gray **Print/PDF Setup** button that looks like this (Figure 13):

Printing / PDF Setup

Figure 13



This button is programmed to set all the print settings for the entire workbook. Please click on this and the screen will flash as it switches from sheet to sheet to make the print setting adjustments. Once it is finished, the Print dialog box will appear (Figure 14).

Notice that **Active Sheet(s)** is selected under the *Print What* section of the displayed Print dialog box. The macro has selected to print all the tabs. This allows all pages to print at once and all the settings will apply to each sheet in the workbook.

To print a hard copy for attorney records, please choose the appropriate printer and then click **Preview**.

Figure 14

Next Previous Zoom **Print...** Setup... Margins Page Break Preview Close Help

CJA 20 Worksheet - Attorney Time

Attorney: Joe Attorney
 Defendant: Jane Defendant
 Material Attorney:
 Case No: CR 07-1234-001
 Judge: JMR
 Bill Date: From: 5/1/05 To: 7/25/07

REMEMBER: Hourly rates are determined by the DATE entered, so PLEASE check your work!

Date	Services Description	Doc Number (ECF)	Pages	15 a Arraignments/Fees	15 b Bail/Defention	15 c Motions	15 d Trial	15 e Sentencing	15 f Revocation	15 g Appeals Court	15 h Other	15 i Interviews	15 b Records	15 c Research/Writing	15 d Travel Time	15 e Investigative/Other
5/1/05	Conference with defendant			0.5								0.5				
5/1/06	Arraignment															


Figure 15

Note: Only lines that have data entered on the **Services** and **Expenses** tabs will be displayed (Figure 15). There should be one page for the **Summary** and one page for the **CJA 20 Voucher** (possibly another voucher page for older pay rates). Click on the **Print** button (circled in red) at the top of the preview area and the file will print with the designated settings.

ADDENDUM

EXCEL 2007 KNOWN ISSUE

There is a known PDF issue using Microsoft Excel 2007. Microsoft is aware of the issue and have published an add-in that may be [downloaded](#) from Microsoft's website. Once you have downloaded the add-in, go back into Microsoft Excel 2007 and open the CJA-20 Hourly Spreadsheet. Click on the **Print/PDF setup** button to set the formatting (the **Print / PDF Setup** button does not apply to MAC users), wait for the *Print* window to display and then click on **Cancel**. Click on the Office button and go down to **Save As...** (DO NOT CLICK). Save As options will display on the right panel, click on the **PDF or XPS** option. Next, a *Publish as PDF or XPS* window will display with the spreadsheet already named. Click the *Save in* down arrow to store the PDF file in the desired directory. Below the *Save as Type* box, there will be a checkbox labeled **Open file after publishing** (this enables the file to launch once it is saved for you to see it). Please make sure that box is checked (only needs to be checked once and then will stay checked). Next, click on the **Options** button. Under the Publish what section, click **Entire Workbook** (this needs to be done every time). Click **OK**. Click **Publish**. The PDF file will automatically launch for viewing.

If when the **Print / PDF Setup** button is clicked, an error displays that indicates the macro is disabled, click on the Office button that looks like this: On the bottom right side of the screen that displays, click on the **Excel Options** button. The *Excel Options* window displays. On the left panel, click on **Trust Center**. Then on the right, click on the **Trust Center Settings** button. The *Trust Center* window displays. On the left panel, click on **Macro Settings**. Then on the right, under Macro Settings section, click on **Enable all macros**. This option must only be set once and will remain until it is changed. 

NO ADOBE ACROBAT?

If you only have Adobe Reader and do not have Adobe Acrobat installed, you will not have the option to create a PDF file until you either purchase and install Adobe Acrobat or download a shareware PDF writer from the internet. The benefit to purchasing and using Adobe Acrobat software is the ability to manipulate the PDF file. Acrobat allows you to open the file and rotate, delete, re-order or add additional pages to the existing PDF. However, there are shareware options available, like www.cutepdf.com, that will simply create a PDF file from the Excel spreadsheet and will allow the file to be viewed through Adobe Reader. For this option, click on the CutePDF hyperlink above. Once at the CutePDF website, install the CutePDF Writer (Freeware). Click **Free Download** and the *File Download - Security Warning* window will display. Please click on **Run** (NOT SAVE). Next, the *Internet Explorer - Security Warning* window will display, please click on **Run**. *Setup - CutePDF Writer* window displays, beginning the setup, click on **Next**. Click **I accept the agreement** on the *Setup - CutePDF Writer* window, then click **Next**. Click **Install**. When it is complete, you will get a *CutePDF Writer Setup* window prompting the install of a PS2PDF converter. Click **Yes** to allow the setup program to download and install this free converter. Once that is complete the setup will launch a Readme file. You can close that window and the Internet Explorer window. The download is complete. Launch Microsoft Excel and open the CJA 20 Hourly Spreadsheet. Click on the **Printing / PDF Setup** button to set the print formatting (the **Print / PDF Setup** button does not apply to MAC users). When the *Print* window displays, under the Printer section, instead of selecting a printer, click on the down arrow and choose the new option CutePDF writer. Click **OK**. A *Save As* window will display with the PDF named the same as the CJA 20 Hourly Spreadsheet. Click the *Save in* down arrow to store the PDF file in the desired directory.

Click on **Save**. The PDF file should be viewed/opened using Adobe Reader.